



A Publication of The Shrine Treasurers Association

STA Ledger

March 2024

STA Updates and Information

Special Dates to Remember

April 7-9, 2024
 STA Meeting
 Egypt Temple
 Tampa, Florida

Meals are included for all
 Treasurers with their paid
 2024 STA registration.

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President Steve Harken

As we enter into a new fraternal year I, as President, would like to welcome each and every one of you to the Shrine Treasurers Association (STA).

The Association meets twice a year, our Mid-Winter meeting and on Sunday at the Imperial Session. As Treasurers, you are welcome to attend either/or both of the sessions. If, for any reason, you can only attend one, I would recommend the Mid-Winter session. The session at Imperial is only four hours long and doesn't give us enough time to have lengthy discussion. The Mid-Winter session usually lasts 3-4 days, including the first day which consists of registration and the opportunity to meet the other attendees. On this year's schedule, Sunday will be registration, Monday will be a joint session with the Recorders and Tuesday will be strictly Treasurers oriented. After years of discussion, this will be the second session where we've met jointly.

The STA elects our officers at the Mid-winter meeting. Anyone can run for an office. However, once you're elected to fourth vice-president, it's a given you'll be in office for five years. The exception is the office of Secretary/Treasurer which is elected yearly. On the rare occasion, we may elect to 2 VP's. This recently happened due to the death of one of the officers. If you should be interested in finding out more about

our duties, please don't hesitate to ask one of the officers when you get to Tampa. Should you be interested in running for fourth vice-president this year, please send your resume to the Secretary/Treasurer at sta.email2022@gmail.com by March 26th.

For the benefit of you who will be attending for their first time, the attire for the meetings is business casual. While you may see a little of everything, most will be wearing slacks with their shrine shirt. It's a little more informal in the hospitality room. At the banquet, the STA officers will be wearing suits. You may want to dress accordingly with tie optional.

As president, I will be leaving office in Tampa. The election and installation of the new officers will be on Monday. It's hard to believe five years have gone that quickly. While I've worked with a number of dedicated officers over the past five years, I think this year's core of officers was the best I had the opportunity to work with. While I could take credit for everything, I can't. It's all on them. Their dedication, ability to work with each other without egos getting in the way and thinking outside the box to come up with new ideas on how to make our Association even better set a high bar for others to meet in the future. Knowing them, they'll probably continue to set the bar higher.

In closing, Sherry and I thank you for allowing us to be your President and First Lady this past year. We will try not to be strangers. We wish the BEST for each of you, not only for this year, but in all your years as SHRINE TREASURERS.



Dennis Saikaley - 1st Vice President



away? Ideally, you, as Temple Treasurer, should be an Alternate Signature on every Club and Unit Account. I understand that in some cases, geographics make it challenging to accomplish this when smaller banks are used. Regardless, the accounts should require two of three signatures. This Report also requires a review by non-signing officers. Please reach out to me if you have any questions.

Submitting Reports

Please ensure that you submit reports (to Imperial) in a timely manner. The Budget and Comparison Report is due to Imperial (with the Elected Divan Signatures) by February 28th. This should be easy enough to accomplish as each of your Temples should have a Financial Meeting in February to allow the Nobility to ratify the Budget. Why not collect any of the missing signatures at that time?

Other Matters

You should ensure that you, or your staff check Webfez on a VERY regular basis to ensure that remittances are submitted. This is especially important at this time of year when we have rolled over the Dues Year. Please be sure to include the necessary documents with your payments.

That is all for now. Although the report is brief, It covers a few key points that will make everyone's job easier. I will close by saying that I hope to see you ALL at the Treasurer's Seminar April 7th-11th in Tampa. It is highly useful and the exchange of information in invaluable.

Please remember that you may reach out at any time. I am normally at the Tunis Office on Tuesday, Wednesday and Thursday mornings.

(613-729-2296) Office

Email (treasurer@tunisshriners.ca).

If emailing, please enter STA and your Temple Name in the Subject Line.

See you in Tampa.

Yours In The Faith,

Dennis Saikaley P.P.
Treasurer, Tunis Shriners
1st Vice President, STA

Greetings One and All,

It gives me a great deal of pleasure to write to you yet again. When you are reading this, all of your Temples will have had their Installations. To those of you who are returning, Welcome Back and to you new Treasurers, Welcome Aboard.

These are both exciting and challenging times. Many of us are or have turned the corner with membership and others are facing interesting times financially, which can be challenging. We can overcome the challenges together. There is a wealth of knowledge in our ranks and there is a strong possibility that others are facing similar challenges. Please reach out.

As Treasurers, we are the stewards of the Temple resources and took an obligation to safeguard them. We should also ensure that reports are collected and submitted in a timely manner. Lets talk about that.

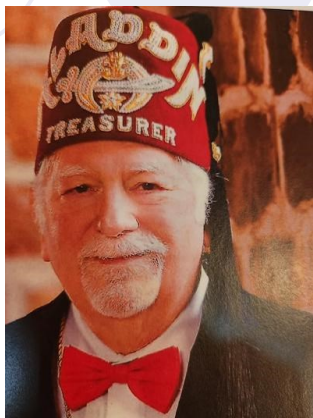
Collecting Reports

You should have all sent each Club and Unit the 'Report of Shrine Clubs and Units (2-41b) Report. These are NOT optional for completion. When sending this report, you should also be asking who the Signing Officers are. We continue to come across nightmares surrounding the Signing Officers. I continue to hear of situations where there is only ONE Signing Officer; NOT! Do you know what happens if this person passes





Bill Kutschbach - 2nd Vice President



Collaboration - Be the glue that holds together the annual leadership transition in the organization. Your understanding of the banking relationship, expense budgeting and cost control mechanisms are essential.

The "BAD" A,B,C's of being a Shrine Treasurer...

Ambivalence - Do you care?

Arbitrary and capricious - No place for it here!

Behavior non -befitting a Shriner? REALLY?

Contrary - Be part of the solution, not the problem!



Fellow Treasurers:

We typically focus on the functionality and accounting acumen of being a Shrine treasurer. Today I am writing to discuss the A, B, C's of being a Shrine treasurer.

The "GOOD A,B,C's" of being a Shrine Treasurer follow:

A's

Accountability - To your fellow Nobles They count on you.

Accuracy - Being precise and accurate in your financial reporting.

Assistance - To your board of directors, Recorder, and Divan.

B's

Budgeting - Budget assistance, awareness, and adherence.

Behavior - Think and act as the guardian of the treasury. That's not only your role, but also the expectations of the position.

Business acumen- While the Potentate is the annual leader of your organization, stability, knowledge and the ability to transact business falls at your feet. Embrace the challenge.

C's

Confidence - Exude confidence and professionalism in your role as the financial leader of the organization and your Nobility.

Continuity - In this position is essential and a key to success.

We try to discuss as many of the inner twinings of being a Shrine treasurer at our mid - winter meeting which encompass both the technical side of "The business" as well as the inherent opportunities and difficulties of the position.

We look forward to sharing with you, our knowledge, vision and thoughts of being a SHRINE TREASURER and learning from your unique experiences. ! COME JOIN US...

See you in April...

J. William (Bill) Kutschbach
Treasurer - Aladdin Shriners
2nd Vice President -STA



Francois E. Nasraoui, 3rd Vice President



Dear Fellow Treasurers,

As we are preparing our Mid-year seminar and the election of the new slate of officers for the ensuing year, we are looking forward to receiving candidacy applications for the office of 4th Vice President of the Shrine Treasurers Association.

It feels like it was just yesterday that I was honored by being elected your 4th VP. Over the past 2 years, I learned a lot about the issues facing Shrine centers all over the United States and Canada. I was also able to contribute and help our association identify the strengths and weaknesses of our membership, thereby allowing us to tailor our education sessions according to the actual needs of our membership.

Over the past few years, your executive has been working very hard and that hard work is paying off. We have been witnessing a steady increase in Shrine centers participation in our Mid-year seminars. The feedback received about our new website, the education sessions, the mid-year events organization, etc. has been extremely positive.

Furthermore, I had the opportunity to meet and work closely with several imperial officers thereby enhancing my knowledge and understanding of the Imperial By-laws and due governance of our Fraternity as well as our Philanthropy.

Last but certainly not the least, I had the pleasure of serving with esteemed nobles who dedicate their time and effort to serve you and

to help improve our organization. These encounters with like minded individuals developed a deep sense of friendship and Esprit de Corps in our group.

Along the way and on a personal level, I have been fortunate to meet a very diverse set of nobles and to have developed close relationships with individuals scattered all over North America.

So, if you share our ideals and would like to help, please forward your candidacy to join the STA Executive line-up. Not only you will be able to contribute your unique skill set to improve our organization, but you will most certainly cement solid friendships while having lots of fun doing it, in true Shriners spirit!

I am looking forward to seeing you in April at the 2024 STA Mid-year seminar in Tampa, Florida.

Stay safe and if you have any questions, please do not hesitate to ask.

YITF :

François E. Nasraoui, MBA, C. Adm.

3rd VP, Shrine Treasurers Association





STA Ledger

Ryan Harris— 4th Vice President



As the Shrine Treasurers Association has been transforming itself into a more educational-based entity over the past few years, I have been honored to serve as its technology chair. Along with Secretary-Treasurer Bill Wheeler, Past President Gary Morgan, President Steve Harken, all of my fellow Vice Presidents, and you, our Association members, we have been able to build on the foundation we inherited from our past members, especially Past Secretary-Treasurer Bob "The Bob" Bulman.

Our website remains ever evolving and our long term goals are still valid, to create an environment where all Shrine Treasurers can virtually gather, meet, share, learn, and teach with each other in a secure, accessible space between our Mid-Year and Annual in-person meetings. Not only do we look to build more opportunities for our current STA members, but to expand the reach of the STA's mission to allow Shriners to help Shriners to make a better Shrine throughout Shrinedom!

Your continued support of the STA is what makes all of this possible, we thank each and every one of you. And we all know a fellow Treasurer or two that just doesn't think its worth attending.

If you are a new Treasurer and need help figureing out what to do and how to do it, get involved in the STA.

If you are an expereinced Treasurer and can share your wealth of knowledge, get involved in the STA.

Like our Shrine Centers, we are just a shell without our members. Your feedback helps us to develop agendas and presentations that make every meeting worth while. We need your assistance to make your Association as great as it can be!

I look forward to seeing familiar faces and meeting new ones in Tampa!

Ryan Harris, CISA
Treasurer, Bahia Shriners - Orlando, Florida, USA
4th Vice President, Shrine Treasurers Association





Brad KOEHN — Imperial Treasurer

Greetings!!

First off, let me congratulate all of you on your election to the position of Treasurer of your Shrine. Whether you are returning for another year, or decided to throw you hat in the ring this year, I appreciate your desire to be involved. As treasurer, you are a leader of your temple and, as such, have a very important role in its success. Support your Potentate and encourage the divan members to work together for the benefit of your nobility and community.

As we begin the new-year let us make sure that our financial houses are in order. There is much to be done. The books are in the closure process with all major accounts being reconciled. Bank accounts must be balanced, prepaids and accruals must be adjusted and the information must be reviewed with a common sense approach. Many reports need to be completed and filed with headquarters including the Budget statement for the ensuing year and the Hospital Patient Transportation Fund Summary.

Make sure that you have appropriate insurance policies in place and that you are including Shriners International and Shriners Hospitals for Children as additional insureds on those policies. Please send a copy of the insurance policy to headquarters.

I invite ALL treasurers to attend the upcoming Treasurers Association seminar the in Tampa. Make plans to attend now and make sure this cost was included in the temple's 2024 budget! The camaraderie and sharing is priceless. There is much to be gained by attending. You will have a chance to hear from members of our home office staff on areas such as budgeting, financial reporting, insurance, legal and more.

This is a great venue to ask questions. I understand those that are in the tax business have obligations that come first, you will be missed. Treasurers and Records are now meeting together, what a great way to reduce costs and share information.



I encourage all treasurers, and for that matter any divan member, to contact Matt Noell, Director of Temple Accounting, or me with any questions or concerns they might have. Remember, we are here as a resource for you.

Thank you again for all that you have done and continue to do for our great Fraternity and Philanthropy. My Lady Cheryl and I look forward to seeing you all soon!

Yours in the Faith,

Brad T. Koehn, Imperial Treasurer





Bill Wheeler— Secretary / Treasurer

Our **2024 Mid-Year Seminar** is coming up and I am enthused about all the changes we have this year. The Seminar starts on April 7, 2024, with evening registration. If you have not made your reservations with the hotel for the reduced STA rate you have until March 20, 2024, to do so.



Going to Tampa, Florida! The Shrine Treasurers Association has been to Tampa several times. This time there is a change! Not a hotel setting, but Egypt Temple venue. Something new! All our events and most meals will be in Egypt Temple. Stay at Hampton Inn & Suites 10240 Causeway Blvd, Tampa, FL. Breakfast and hospitality room included bus to Egypt Temple. Treasurers and Recorders will meet together Monday morning April 8th, afterward breaking into our training in Memorabilia Room.

Elections: Shrine Treasurers Association officers are elected annually by ballot. This will be after lunch on Monday. We vote for President, four (4) Vice -Presidents and Secretary-Treasurer, in the Memorabilia Room. If you think you would like to be an officer and have more to give to Shrine Treasurers Association make sure your resume is presented to our Nominating Committee before March 31, 2024. Use email sta.email2022@gmail.com, or mail to STA, P O Box 1, Flat Rock, AL 35966.

Below you will find photos of our host hotel and one of the meeting rooms at Egypt Shrine.

William A “Bill” Wheeler

Cahaba Shriners

STA Secretary-Treasurer



STA Ledger

2024 AGENDA

SHRINE TREASURERS ASSOCIATION

MID-WINTER SEMINAR

April 7–9, 2024 Egypt Temple, 5017 E Washington Tampa, Fl

Sunday April 7, 2024

2 PM – 4 PM

Registration – Hampton Inn & Suites, 10240 Causeway Blvd. 813-497-4590

4 PM – 9 PM

Welcome Social, Egypt Temple - (dinner on your own from Egypt Temple Menu)

Monday, April 8

Joint Treasurers & Recorders – Egypt Temple Grand Hall

8:00 AM – 9:30 AM

Call to Order - Invocation - Flag Salute_– Association Presidents STA Steve Harken, Mohammed Shriners and SDA Wayne Kelly, Khedive Shriners. Introduction Imperial Potentate Ed Stolze, Imperial Recorder Jim Cain, Imperial Marshal Tim Forbis. Association Officers, Past Presidents, new Recorders, new Treasurers and Shriners International Staff.

9:30 AM – 11:00AM

EVP/COO John Piland Presentation - Grand Hall - Treasurers and Recorders

11:00 AM-11:15AM

Break

11:15AM-12:00PM

Temple Accounting - Director Matt Noell and Deb Domini – Memorabilia Room

12:00PM-1:00PM

Lunch - Grand Hall

1:00PM – 3:00 PM

Temple Accounting - Director Matt Noell and Deb Domini – Memorabilia Room

3:00PM-3:15PM

Break

3:15PM – 3:30PM

Elections – Memorabilia Room

3:30PM-4:30PM

Hospital Chairman Imperial Sir Jerry Gantt – Grand Hall – Treasurers and Recorders

6:30PM – 9:00PM

Joint Banquet, Hospitality, and Installation

Tuesday, April 9

TREASURERS – Memorabilia Room

8:30 AM – 9:00 AM

Call to Order

9:00 AM – 10:00 AM

SI Per Capita and Strategic Planning Imperial Marshal Tim Forbis

10:00 AM – 10:15 AM

Break

10:15 AM – 11:00 AM

Temple Financial Manual – 1st VP Dennis Saikaley, PP Tunis Shriner

11:00 AM – 12:00 PM

Shrine Treasurers Association Web Site –4th VP Noble Ryan Harris Bahia Shriner

12:00 PM – 1:00 PM

Lunch – Grand Hall

1:00 PM – 3:00 PM

QuickBooks/Sage



SHRINE TREASURERS' ASSOCIATION



Joint Mid-Year Seminar with Shrine Recorders Association

April 8 & 9, 2024

Pre-Registration Required!!

Event Location: Egypt Shrine Temple,
5017 E Washington St.
Tampa, Florida 33619

STA Check-in at hotel: Sunday April 7, 2024, 3 – 5 PM

Seminar Registration deadline Monday March 25, 2024

NOBLE _____ LADY _____

SHRINE TEMPLE _____ PHONE _____ EMAIL _____

Arrival Date _____ Departure Date _____

FIRST TIME ATTENDEE!! Yes No

\$150.00 Treasurers Registration Fee includes:

- Access to business sessions on Monday and Tuesday (April 8-9) at Egypt Shriners with lunch buffet on both days
- Dinner at the Joint Installation Banquet on Monday evening at Egypt Shriners
- Transportation between the Hampton Inn and Egypt Shriners during the events (Sunday-Tuesday)

\$100.00 Lady's Registration Fee includes:

- Attendance to "The Florida Aquarium" tour on Monday (April 8) with lunch leaving from the Hampton Inn
- Dinner at the Joint Installation Banquet on Monday evening at Egypt Shriners
- Transportation between the Hampton Inn and Egypt Shriners during the events (Sunday-Tuesday)

Total Enclosed _____

Checks MUST be in US Dollars drawn on US Bank. Mail to:

Shrine Treasurers Association

PO Box 1

Flat Rock, AL 35966

Please make your own Hotel Reservations – Cut-Off date March 20, 2024

Hampton Inn & Suites, Tampa/ Riverview/Brandon

10240 Causeway Blvd, Tampa, Florida 33619

Reservations **1-800-774-1500**, block is **SHRINE TREASURERS – RECORDERS ASSOCIATION**, RATE CODE: **SRT**

Embracing Change: STA 2023



